Saskatchewan
Tourism and
Small Business

TIPPERARY CREEK CONSERVATION AREA
HERITAGE ATTRACTION:
TOURISM IMPACT STUDY SUMMARY

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INTRODUCTION/SUMMARY

This tourism study has been undertaken to assess the possible market demand and economic impact possible through the development of Tipperary Creek. Other objectives have also been pursued in undertaking this study. Since the project is intended to deal primarily with Northern Plains Indian Culture it was felt desirable that a significant portion of the economic benefits realized through the investment should accrue to aboriginal peoples if possible. This study is also concerned with the establishment of guidelines with regard to the most cost efficient and effective level of development from a tourism/economic perspective, as well as providing an assessment of the administrative implications and regional tourism linkages possible through the development of Tipperary Creek.

The Significance of Tipperary Creek Has Been Suspected For Over 50 Years

Tipperary Creek has been recognized as a unique heritage resource for some time. Although archeological investigations date back to the 1930's and 1940's, the first officially recorded investigations have occurred since the late 1950's. Dr. E. Walker has recently completed the most extensive investigations and these results have produced the confirmation of some 21 prehistoric significant archeological sites dating over 6,000 years of age in some cases, making Tipperary Creek over twice as old as artifacts recovered from King Tut's Tomb in the pyramids of Egypt. It is the richness and diversity of this archeological resource which make it a very strong candidate for designation as a world heritage site. These factors in addition to its close proximity to a major urban centre provide Tipperary Creek with the potential to become a significant tourism attraction of international quality.

The Tourism Significance of Tipperary Creek Was Assessed Against 15 Other Similar Important Archeological or Historic Sites in North America

This study provides an in-depth assessment of the tourism potential which might be expected to occur as a result of the development of Tipperary Creek. In conducting this assessment 15 similar historic and/or archeological attractions located throughout North America were reviewed. This investigation revealed valuable information as to the level of development as well as the operational features which would be important if Tipperary Creek was to become a major tourist attraction. In addition it provides evidence that archeological attractions of the quality of Tipperary Creek can become major tourism attractions.

Development of Tipperary Creek Should Fall in the 3 to 7 Million Dollar Range

The analysis of comparative attractions as well as a review of the resource opportunities at Tipperary Creek concluded that capital developments within the range of $3,000,000 to $7,500,000 would be reasonably justified for Tipperary Creek and that depending upon the level of development undertaken an annual operating budget ranging from $700,000 to $1,500,000 should be provided for the site. In so far as important development features were concerned, programs such as live dramatics, interpretive guides as well as a high quality visitor centre and audio-visual theatre were found to be critical to the site's success as a tourism attraction. To a somewhat lesser extent regular themed events and on-site archeological research as part of the interpretive program were also found to be important. The success of Tipperary Creek as a significant tourist attraction will only be realized if it is developed to a level equivalent to competitive attractions.

A Reasonably Elaborate Visitor Centre Will Be a Critical Development Requirement

The tourism potential of Tipperary Creek will very much depend upon the quality of its resources and how well they are developed. There are two resource constraints which must be compensated by higher levels of development than called for in the Master Plan. The first is the harsh and unpredictable climate which occurs for much of the year in Saskatchewan. This requires the construction of a more elaborate visitor's centre than originally envisioned in the Master Plan in order for it to be capable of performing as a stand alone interpretive facility. The current Master Plan did not intend to market the site as a major tourist attraction. A much larger annual visitation is possible than was envisioned in the Master Plan. Indeed this higher level of visitation is likely to occur as a result of developing the site's resources.

The second resource constraint is the nature of the artifacts themselves found at the site. Unlike other Indian archeological sites such as the Cliff Dwelling Indians of the southwestern U.S. or the Aztec Indians of Central America, Northern Plains Indians' culture must be significantly visually recreated in order to be easily revealed to the visitor. As such the interpretive program support material must be extensively developed and creatively conceived.

The Active Involvement of Saskatchewan Indian Organizations Could Have a Very Significant Impact on the Success of Tipperary Creek

Just as there are resource constraints, there are also resource opportunities. One of the single greatest resource opportunities is the site's diversity of cultural artifacts and close proximity to a major urban centre. Of equal importance as a resource opportunity are the Saskatchewan Indian people themselves. It is their active involvement in development opportunities of the site which will make it more unique and attractive. The direct employment of Indians on site

and the active involvement in planning and management of the site has a tremendous potential to create tourist interest in any facilities developed at Tipperary Creek.

Up to 150,000 Visitors Per Year Could Be Attracted to Tipperary Creek

A market assessment was undertaken for Tipperary based on the known resources at the site, the tourism appeal found to exist at related attractions, and the existing travel market demand in the Saskatoon area. A total of up to 150,000 person visits per year have been estimated as possible for Tipperary Creek and of these 150,000 visitors, 110,000 would be tourists. This visitation level is higher than all other historic sites in the province and approaches the visitation levels of Saskatchewan's major museums such as the Western Development Museum in Saskatoon and the RCMP Museum in Regina.

The 150,000 Annual Visitors Projected for Tipperary Creek Will Be Generated Largely from Existing Travel Volumes to Saskatoon

This study was primarily concerned with the establishment of the level of demand which could be captured independently by Tipperary Creek. While single sites such as Tipperary can be important tourist attractions in and of themselves, Tipperary Creek is generally of insufficient size to generate substantial "new travel demand" for Saskatoon on its own. Most of the 100,000 to 150,000 annual visitors projected would consist of persons who were in Saskatoon in any event rather than those who would have travelled to Saskatoon specifically to see the site.

Certain exceptions to this would be special interest groups such as bus and packaged tour groups, as well as academics, professionals and hobbyists interested in Northern Plains Indian Culture. Such "new travel generation" would however probably represent less than 10% of total demand.

Tipperary Creek Combined with Development of the Saskatchewan Rivers Heritage Area Would Produce Significant New Tourism Travel Volumes for Saskatoon and Prince Albert through the Creation of a Major International Quality Heritage Travel Destination.

The role of Tipperary Creek as an anchor attraction within the Saskatchewan Rivers Heritage Area would produce a major impact on creating new travel demand to Saskatchewan. The full development of Tipperary Creek and the Saskatchewan Rivers Heritage Area (SRHA) would provide visitors with an opportunity for extended stay travel as well as rural and urban sightseeing opportunities within an "international quality" tourism destination region. Tourism expenditure impacts possible through the combined development of Tipperary Creek and SRHA would be expected to meet, if not surpass, economic impacts equivalent to those received annually from major Saskatchewan tourism attractions such as Western Canadian Agribition (tourist receipts in excess of $17 million annually).

Significant New Private Investment Opportunity Would Be Created Through the Development of Tipperary Creek and the Saskatchewan Rivers Heritage Area

The development of Tipperary Creek and the SRHA would also drive substantial new private sector investment opportunities in the region creating an opportunity for 400 new hotel rooms, 10 new high quality dining establishments, and possibly as much as 100 business expansions or new business opportunities. As a result, the development of Tipperary Creek should be considered as a significant and critical first step in the greater development of the Saskatchewan Rivers Heritage Area.

Three Development Options Have Been Prepared for Tipperary Creek Ranging Between 3 and 7.5 Million Dollars in Capital Cost

Based on the existing Master Plan for Tipperary Creek and the potential tourist visitation to the site, three development options have been prepared for consideration. Option 1 is best described as being closest in character to the existing Master Plan, however, it calls for a doubling of the size of the visitors centre. Options 2 and 3 present a significant departure from the Master Plan but are considered necessary in order to begin to capture the available tourism demand. Specific financial and economic details with regard to the three options are provided in the following table on page 7.

Over 400 Direct and Indirect Jobs Could be Created Through the Development of Tipperary Creek

As shown in this table the economic impact associated with developments at Tipperary Creek would be significant for any of the three options. Depending on the level of development undertaken an employment impact of somewhere between 180 and 426 person years of employment would be created. Annual increases to travel expenditures made in Saskatoon would range between $2.3 million per year and $5.2 million per year. Taxation flow back to the three levels of government would range between $500,000 and $1,200,000 per year. Subsequent development of the Saskatchewan Rivers Heritage Area would increase these impacts by tenfold.

Option 2 Costing $5.2 Million is Recommended as the Best Option to Pursue

This study goes on to further analyze each of the three development options proposed for Tipperary Creek and ultimately concludes with the recommendation to implement Option 2. This recommendation is based on the conclusion from the analysis that Option 2 is the most cost

TABLE 1

	Option 1	Option 2	Option 3
Capital Cost	$3,000,000	$5,200,000	$7,500,000
Annual Operating Budget	$ 700,000	$1,100,000	$1,500,000
Annual Visitation	60,000	110,000	150,000
Employment Generation (person years)			
. On Site	19	30	41
. Off Site (indirect/induced)	75	134	177
. Construction Phase	86	143	208
Total	180	307	426
Annual Tourism Expenditures	$2,399,040	$4,248,300	$5,240,000
Annual Taxation Return to Government (Federal/ Provincial/Municipal)	$ 522,144	$ 924,630	$1,212,860
Net Benefit Remaining in Saskatoon			
. Employment (person years)	130	221	306
. Annual Household Income	$2,399,040	$4,248,300	$5,240,000

efficient in terms of job creation, tourism expenditure and offers the shortest time frame for government to recover its investment. Although option 2 is a somewhat greater level of development than the level envisioned in the Master Plan it achieves a better overall performance in terms of objectives related to the eight objectives identified for this study. Option 2 carries the additional advantage of being expandable to the level of development contained in Option 3 if demand is warranted.

The Canada/Saskatchewan Tourism Development Agreement Will Be a Critical Source of Capital Funds

This study identifies a number of possible funding sources which might be considered to implement an option 2 level of development. In so far as capital funding is concerned the recent Canada/Saskatchewan agreement on tourism development no doubt represents one of the best single sources however both existing and new foundations as well as major corporations and Indian economic development programs should also be considered as possible sources of capital funds.

Operational Funding Will Come From a Mix of User Fees and Annual Grants

Operational funding is projected to be sourced in terms of user fees (33% of budget), annual core funding grants (35% of budget) and special program or project funding opportunities (32% of budget). User fees would be generated largely from park entry receipts. Core funding would need to be negotiated with senior governments and special project funding would be pursued related to employment creation programs as well as special cultural events or projects funding assistance programs. The annual core funding supplied by senior governments would be more than covered by additional taxation revenue as a result of the increased economic activity associated with operations of the site.

Implementation Will Require Careful Co-ordination of Development Planning, Funding Procurement and Public Relations

The study concludes by providing specific suggestions as to alterations required in the site Master Plan, a listing of new opportunities for the Saskatoon small business sector as well as a process flow chart for guidance during the implementation phase. Attempts to implement a specific development plan for Tipperary Creek must successfully lock into phase efforts which relate to site planning and development, public relations and promotions as well as financing. The process flow chart contained in the last chapter of this study clarifies the important relationship which must be maintained between these important implementation tasks.

In terms of new business opportunities for the private sector, the development of Tipperary Creek would provide for several major benefits including opportunity for a 25 - 30 room expansion for the hotel industry in Saskatoon, $600,000 in new income opportunities for the restaurant industry and over 15 small business expansions and/or new business development opportunities. To the extent to which Tipperary Creek drives additional development of the Saskatchewan Rivers Heritage Area, significantly greater new business opportunities would occur. In this sense the economic opportunities available through the development of Tipperary Creek are equally as important as the cultural opportunities.